JUMP
Joining Users from Multiple Platforms

Marshall Health | Cabell Huntington Hospital

Provider
Pocket Guide

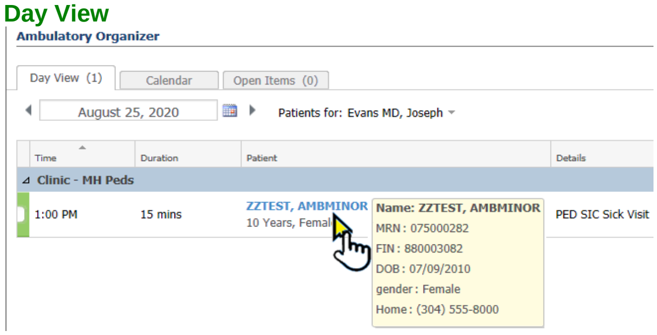
Ambulatory©
Provider Pocket Guide

Workflow Views/mPages

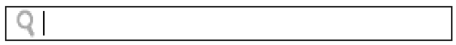
Select Clinic or Acute Home based on your venue.

The Acute Home will open to the CORES/Handoff Lists.
The Clinic home will open the ambulatory Organizer.

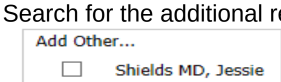
Day View



1. Provider name will default in the **Patients for**: field.
2. To locate additional providers or resources click directly on **Patients for:**



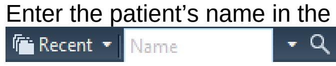
3. Search for the additional resource:



4. Click on the patient name to open the chart.

Click the **Open Items** Tab of the organizer view to display any incomplete Notes and Charges from past visits.

Whenever possible patient charts should be opened from the schedule. This ensures documentation is captured on the correct encounter/FIN. Access to patient charts that are not on the schedule will require a patient search.

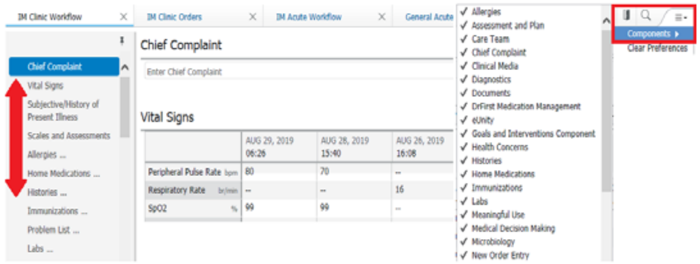
1. Enter the patient's name in the patient search field 

 (upper right).
2. Click **Enter** to display matching patients on top.
3. Lower portion of window displays patient encounters.
4. **Select correct patient <u>and</u> correct encounter FIN**.
5. Click **OK** to open the chart to the appropriate visit .

* *You will be prompted to declare a relationship.*

Each specialty has it's own tabs for workflows and quick orders. Additional specialty tabs may be added, and the tabs rearranged by dragging and dropping left to right.

The workflow views contain the following components where patient data can be reviewed and added



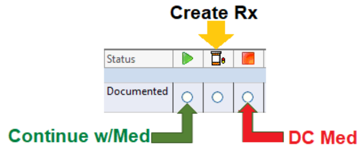
Workflow components can be removed from the list by unchecking the components  in the upper right corner and/or rearranged by priority top to bottom on the list using the **Drag and Drop** method.

Workflow View

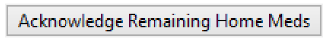
6. Click the Workflow tab to Review all available information with the patient.
   1. Review **Vitals**
   2. Review **Labs** – Tag Relevant results if desired. Click Ctrl + results to Tag multiple values
   3. Review **Allergies** and Complete Reconciliation

4. Review **Home Medications**

1. Select a radio button to complete each action



2. To continue reconciling without addressing medications you are not managing, click

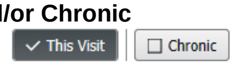


3. Click **Sign**

4. Review and Add other pertainent medical history, clicking **Mark as Reviewed** or **Complete Reconciliation for** each area as appropriate.

Problem List

1. Select **Problems** from workflow
2. Review the list and mark each as **This Visit and/or Chronic**



3. To add a new problem enter the term, CPT or ICD 10 code # in the **Add Problem** Search field.

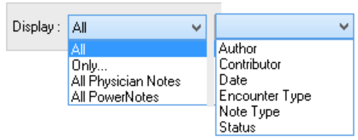
The list of matching terms/codes will appear .

4. Click **OK**.

**Only Physicians should be entering diagnosis.*

Documents

1. Navigate to the **Documents** header on the Workflow Page, or **Documentation** on the Table of Contents.
2. Select filters to narrow results



3. Double-click on any document to view.

Tagging Items to Include in Note

1. To tag items from a clinical note highlight desired text and select 

2. Tagged items can be included in the final note once it is ‘created’.

REMINDER: The Workflow Page is Designed to increase your efficiency by guiding you through <u>both</u> ***Review of existing* -and- *Inclusion of new*** results and observations as you work through the categories of data.

Navigate down the Workflow items to review the chart and begin documentation of HPI, ROS, PE and Assessment and Plan

This method will allow you to review all previous data while populating your note.

Begin Note Documentation

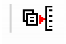
1. To split your workflow mpage screen and move the freetext sections to the right of the screen click the split screen icon.
2. To drag your text over to the freetext sections once the screen is split, highlight the desired text and click the drag text icon

3. You will then be able to drop the text in to the desired field of your note by dropping it wthin the dotted lines:

4. When you have completed your documentation on the workflow mpage, you can navigate to the bottom of the workflow menu and select your note type.

Free text/Autotext fields

Creating Personal Auto Text

1. Click the Manage Auto Text icon  in any message or documentation field to open the Manage Auto Text screen.
2. Click on the New Phrase icon  and the Abbreviation and Description boxes become active.
3. Enter an **abbreviation** (shortcut) for the new phrase
    1. You can use a special character or letter combination of your choice, e.g. $ or *hcm.*
    2. It is important to include enough identifying information after the symbol so you know what it is - such as $normlabs. This allows the user to retrieve the text and know what it contains.
    3. In the Description provide a brief summary of the text content e.g. *Normal Review of Systems.*
    4. Paste or free text the content into the auto text body. You can also incorporate data tokens, Smart Templates and Drop Lists as desired.
4. Click **Save**.

Modify and Save a “Public” Autotext Phrase

1. After Duplicating a Public Phrase, update the Abbreviation to remove’Copy’ and include your personal abbreviation shortcut.
2. Edit the duplicated text as needed and click **Save**.

Copying an Auto Text Phrase from Another User

Complete the following steps to copy one or more phrases from another user's library to your own:

1. Click  on the toolbar.
2. On the left side of the view, search for and select the user whose phrases you want to copy. A list of phrases is displayed under the username.

3. Select the appropriate phrase from the user's library, or select the Select All check box if you want to copy all of the user's phrases.
4. To locate the appropriate phrase, you can either browse the list of phrases or use the Search Auto Text box to search for an abbreviation.
5. Click Copy.
6. In the Copy Auto Text dialog box, click Copy. Optionally, update phrase abbreviations or descriptions as needed before you confirm copying.
7. A warning icon is displayed next to any phrase abbreviation that matches the abbreviation of a phrase already in your library.

8. Log out of PowerChart to save the copied phrases.
9. Log in to PowerChart again. The copied phrases are displayed in your library.

Ad Hoc Charting

1. Select **AdHoc** icon from the toolbar to document an assessment, procedure, POC test result, record/transcribe labs, etc.
2. **Folders** will appear which contain forms for specific documentation/Specialty areas.
3. Select the forms needed for visit (can multi-select).
4. Select **Chart on the lower right of the pane.**
5. **Sign** forms upon completion by clicking on at the top left of form.

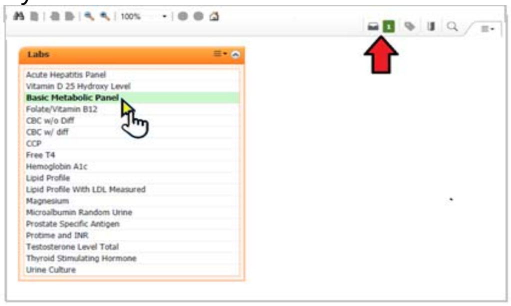
Many forms are associated to note templates that will pull data into the provider visit note. Examples include the Medicare Annual Wellness Assessment form, Developmental Milestones forms and many others found within the departmental specialties folders.

Placing Orders from the Quick Orders Page

Prior to entering orders, it is recommended that a diagnosis be recorded by the responsible provider to which orders can be associated. Alternatively, non-provider staff may enter a reason for visit or chief complaint as a "working diagnosis" so that orders can be entered, signed, and routed to the responsible provider for co-signature.

1. Click on the Quick Orders tab at the top of the Workflow View.
2. Locate the order within the desired category and click on it to select.
3. Click **OK**.
4. At the top right of the Quick Orders Page you will note a "recipe box"  with a number to its right. This is the Orders for Signature indicator.

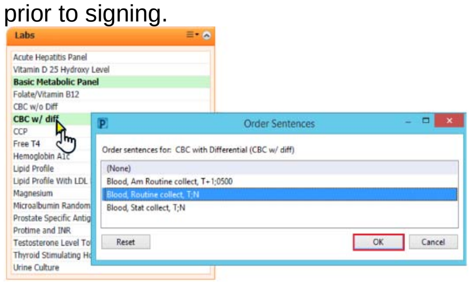
The number will increase for every additional order you click.



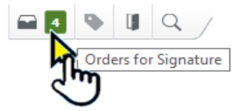
Addressing Order Details

1. Orders that have recommended sentences may prompt the user to select details such as status (Stat, Routine, Timed Study), or for Medications Dose, Route, Frequency, etc.)

2. Select the appropriate order sentence if it is available, otherwise, select (None) and modify order specifics as part of the review process prior to signing.



3. When all orders have been selected click the **Orders for Signature** indicator:



4. Orders with the  icon have missing required details that must be addressed.
5. **Sign** the order.

Common Order Detail Requirements

Lab Orders

*Specimen type (Blood, Sputum, CSF, etc.)

*Collection Priority (Stat, Routine, TS, etc.)

*Specimen source (body site)

*Requested **Start** Date/Time: Defaults current date/time, change if appropriate

* All orders will default to **Future** Status

Imaging Orders

*Requested Start Date/Time: Defaults current date/time, change as appropriate

*Reason for Exam: this is not necessarily the same as diagnosis, but gives the imaging team better information regarding what views should be captured.

*All clinic orders will default to **Future** Status

Medication Orders

*Strength/Volume dose: Numeric value modifier for Units, mg, mL, etc.

*Requested Start Date/Time: Defaults to current date/time

*Route of Administration: IM, IV, etc.

Discharge Medication Orders

*Dose: e.g. Number of tabs, puffs, mL, etc.

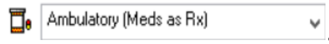
*Route: e.g. PO, Topical, both eyes, etc.

*Frequency: e.g. Daily, BID, With Meals, etc.

*Dispense: e.g. 30 tabs, 100 mL, etc.

Prescriptions and DME – Ordering

- Select **Orders (+Add)** on the menu.

- Change **Type** of order to **Prescription** 

.
- Enter prescription name or DME in the Search field
- List will appear with medication/DME name and medication name with different order sentences.
- Click **Done** to close the order entry window.
- Complete order details by clicking the specific order detail being addressed. Choices will be listed in **Detail Values** window or enter free text value.
- 

Routing choices are **Do Not Send, Printer, Pharmacy (fax**).
- Select **Do Not Send** if calling in prescription
- Select **Pharmacy** if Auto Faxing prescription.
- Select **Printer** when printing in clinic. Printer displayed is default printer for user.
- **Sign** the order(s) (lower right of screen).

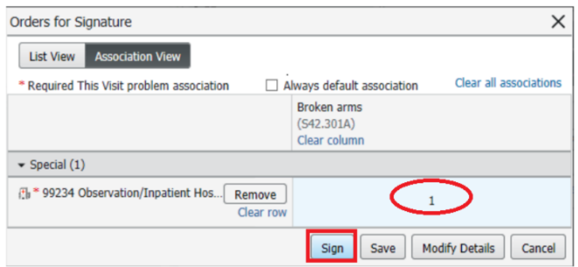
Note: Printed Rx & DME must be signed by provider.

Entering Charges from the Quick Orders Page

Charges must be entered as orders. The charges available to providers are based on the specialty or area of practice.

1. Open the Patient Chart.
2. Select the Quick Orders Tab
3. Expand the appropriate code set in the E&M Widget.
4. Click the Orders for Signature icon.

5. Associate the appropriate Diagnosis to the order.

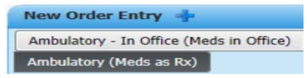


6. **Sign** the Charge Order

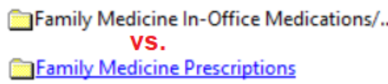
Medications/Immunizations Given in Clinic

- Select **Quick Orders** mPage
- Your common departmental meds may be listed beneath these categories or click **New Order Entry** to open the order profle and search.

- or -

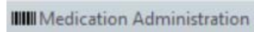


- **Make sure you are selecting *In-Office or Rx***



- Select the correct order/sentence from the list or Search for the orderable.
- Enter the ordering provider and communication type. If additional medications required, follow steps 3-4.
- Click **Done** to close the order entry window.
- Complete order details. Indicates missing detail.
- Yellow arrows link to individual missing details
- **Sign** the order(s).
- Order will be listed as ***Processing***, click **Refresh.**
- Access **Activities and Interventions** from the Table of Contents or MPTL from toolbar to display tasks.

In-Office Medication Administration

1. Click the 

toolbar button
2. Click the **Next** button to bypass wristband scan
3. **Scan** the medication/immunization barcode
4. **Click** the checkbox next to the medication


5. Provide a **Reason** the wristband was not scanned.
6. **Scan** the medication/immunization barcode
7. ***Make sure to select the administration charge!***
8. Complete administration details and **Sign**.
9. **Refresh**.

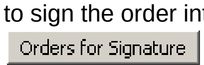
Obtaining External Prescriptions-Document Hx Meds

Dr. First is accessible from the Ambulatory Workflow Page and can be used to populate the documented medications by history, which is required prior to performing the provider performing Medication Reconciliation.

This application queries national insurance and pharmacy databases based on last name, first name, date of birth, gender and zip code as these are standard EHR connecting requirements.

External medication history is stored and queried in the EHR and can be added to the patient's active medication list as current medications.

1. From the Ambulatory Workflow M Page, click the component ***DrFirst.***
2. Click the view (3, 6, or 12 mo.) that you want to retrieve, then click **Document History**.
3. DrFirst will then retrieve the data.
4. There is a component in Dr. First that displays any existing medication that exists in Cerner. The external medications can be converted to Prescriptions or to Documented Medications **by right clicking** on the appropriate medication.
5. Once the action is selected the user is prompted to sign the order into the legal chart:

6. The documented medication will be displayed in the orders profile.

7. Click the **Sign** button to commit the historical medication to the record.

Renewing Prescriptions

Rx must be in **Ordered** status on the medication list or order tab to prescribe.

1. Right click the prescription to be renewed on the medications list.
2. Select **Renew** and choose the supply and # refills.
3. Verify pharmacy routing with patient.
4. Click **Orders for Signature** (lower right of screen).

5. Click **Sign** (lower right of screen).
6. **Refresh** screen. Medication selected for refill will be in complete status, renewed medication will be in ordered status.

Converting Documented Meds by Hx to Prescriptions

1. Medications that are **Documented by History** can be converted to active prescriptions.
2. Right click and select **Convert to Prescription.**
3. Continue from step 6 – **Prescription – Ordering.**

Converting Meds to New Prescriptions

1. Medication orders in the **completed or discontinued** status can be converted to an active prescription .
2. Right click completed or discontinued medication
3. Select **copy.**
4. Continue from step 6 in **Prescription – Ordering**.

Order Favorites

1. Select **Orders (+Add)** on the menu list.
2. Search for an order or medication.
3. Right click order and select **Add to Favorites.**
4. To save orders with the order details – enter the order details, before signing the order, right click the order and select **Add to Favorites**.
5. Select the **Favorites** icon to verify.
6. **Allergy substance, reaction and Problem/Diagnosis favorites** can be saved by

selecting then clicking **Select to Favorites** –after the search action.

7. To Organize Favorites, Click the drop down next to the yellow star icon
8. Click **Organize Favorites.** Use screen instructions.

Messaging

To start a message, click **Communicate** on the tool bar.

Messaging – Create New Message

1. If within the correct patient's chart, Click the **Communicate** icon .
2. If outside the patient's chart enter the patient's last name in the **Patient** field and **Click** the binoculars.
3. Select the patient and click **OK.**
4. Enter any message recipient(s) in the **TO** and **CC** boxes. To include yourself as a recipient click **Include Me.**
5. The **SAVE TO CHART** field will default.
6. Select a Template in the Subject dropdown if desired, or free text a message **Subject**.
7. Messages will default to **Save as**: Phone messages. Select a different folder to save to if needed.
8. Free text or use auto text to populate the message.
9. Select any additional messaging/reminder options.
10. Click **Send.**

Messaging – Replying or Forwarding

1. Open a message and click **Reply** to sender or **Reply All** to include all message recipients.

2. Compose the response or insert auto text.
3. Set a reminder or due date as necessary.
4. Select any additional messaging options and **Send**.
5. To Forward a message, click the **Forward** icon and proceed with steps 2-4 above.

Proxy – Granting

1. Click the **Proxy** tab in the **Inbox Summary**.
2. Click **Manage** button.
3. Click **Given** button at bottom of screen, then **Add.**
4. Select any recipient from the **User** Search.
5. Select **Begin** and **End** dates.
6. Select **Available Items** to Grant.
7. Click **Accept & New.**
8. The users displayed in the **Proxies Given by Me** pane are authorizations you have granted others.

Proxy – Viewing Another User's Inbox

1. In order to view another user's Inbox, you must have proxy rights to do so
2. Click the **Proxy** tab in the **Inbox Summary.**
3. From the **Proxy** list, select the Inbox you would like to access
4. Work in the proxy's Inbox as if it were your own
5. To review an item and leave for the original owner, **close** the item. Do not sign, refuse or forward.

Opt in to Pools

1. Click the **Pools** tab in the **Inbox Summary**.
2. Click **Manage** button.
3. Scroll through the list of available pools and highlight those to opt in to <Ctrl + Click>
4. Click the **Opt In** button between the Available and Member Pools panes to opt in to the pool.
5. The pools are available in the Pools drop down of your inbox.

Placing Blood Product Orders (Acute)

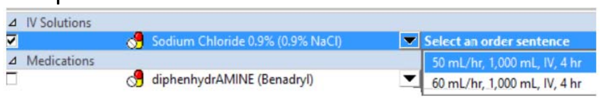
1. Click the appropriate PowerPlan.

1. **Blood Products: Make Available** - Orders can be placed in a Planned State for Future Administrations.

2. **Blood Products**: **Transfuse Now** – Stat Orders for immediate administration

3. Click the **Orders for Signature** indicator.
4. Click the **Modify Details** button.
5. Select each of the orders required by placing a check on the box on the left.

6. For each selected order, choose an appropriate order sentence from the dropdown list options.



7. Click 

8. Click 

Patient Admission – Patient Status Order Powerplan

The PSO PowerPlan is available on all Acute Quick Orders, and can be searched for from clinic orders.

1. If this is a Direct Admission and you will be the Attending Physician, select the appropriate PSO (Inpatient, Observation or Outpatient in a Bed) and complete the required fields for Level of Care and Medical Service.
2. Enter an appropriate Diagnosis if not already associated.

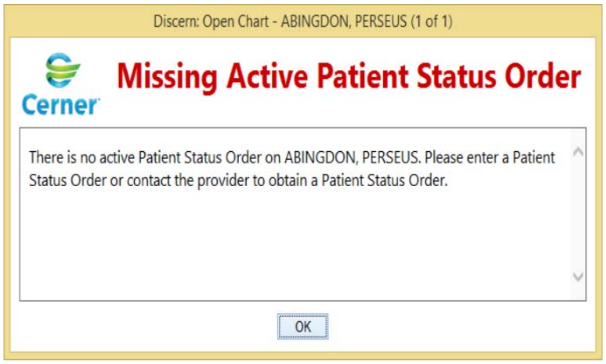
3. Click the **Plan for Later** button of the patient is awaiting transfer to the unit, or **Initiate Now** if the patient is already bedded.

4. When the PSO is in a **PLANNED** state it will be Initiated by nursing staff on the newly created hospital encounter.

PSO for Admission from the ED

1. ED Physician will contact the Hospitalist or Admitting Service. The accepting physician will place the PSO order with the same steps as previously described.
2. If the patient will need to wait in the ED for bed placement, then the ED Nurse will Initiate the PSO and start the clock on the admission and the patient will be in the appropriate status, Level of Care and under the appropriate Medical Service even though the location will be a Virtual Bed within the ED until the bed on the floor is ready.

If there is no active Patient Status Order on an admitted patient, the following warning will be displayed upon opening the chart.


Discern: Open Chart - ABINGDON, PERSEUS (1 of 1)
Cerner
Missing Active Patient Status Order
There is no active Patient Status Order on ABINGDON, PERSEUS. Please enter a Patient Status Order or contact the provider to obtain a Patient Status Order.
OK

Notes

First Line of Support: SuperUser
Name: ______________________
Extension: __________________